

SC LENDS

ILL User Manual

Disclaimer 1

This document is a modified version of the ILL section of the Michigan Evergreen User Manual. The screen prints are as they appear in that document. The procedures and field names have been updated slightly to reflect the SC LENDS ILL template and version of Evergreen

Disclaimer 2

This document may not reflect the ILL procedures within your library system. You are free to modify it as needed to serve your staff. Please, however, continue to give credit to Michigan Evergreen for creating the original document.

Recording Interlibrary Loan Transactions

When your library borrows an item from a library outside of SC LENDS, you will want to record this interlibrary loan (ILL) transaction in the system. As of now, there is no specific ILL module in Evergreen. You can either record the ILL as a pre-cataloged item, which takes just seconds but does not allow for tracking. If your library wants to track ILLs and generate reports, you can use the method described in this document. This suggested method will allow you to track ILLs and generate reports. It will also allow patrons to renew their ILLs online (if your local policy allows ILL renewals).

The following Exercise is broken into three segments:

1. Initial ILL Staff workflow to process incoming ILL materials from other libraries.
2. Circ Staff workflow to check out, check in, and return materials to ILL Department.
3. Final ILL Staff workflow to process ILLs for return to lending libraries.

Initial ILL Staff Workflow

First, your library's ILL staff will create a brief bibliographic record for the item.

1. Log into Evergreen using an ILL user log-in. (An ILL user is assigned to the ILL Staff SCLENDS profile.)
2. Click on **Cataloging** on the menu bar and select **Create New MARC Record**.



3. Select the MARC template for BCL-ILL and click **Load**.



4. Enter as many of the fields as you can or as required by your library system. One note, the first 599 field must remain "ILL Record." Use the second 599 field to record the lending library if needed.

Type	c	Elvl	3	Srce	d	Audn	Ctrl	b	Lang	
BLvl	a	Form					MRec		Ctry	
Desc	5					DtSt	Date1		Date2	
TrAr	0	Part		LTxt	00	FMus	AccM	0	Comp	

LDR 00869cab 22002535 4500

001

008 011108 000 0

010 #a

020 #a isbn0001

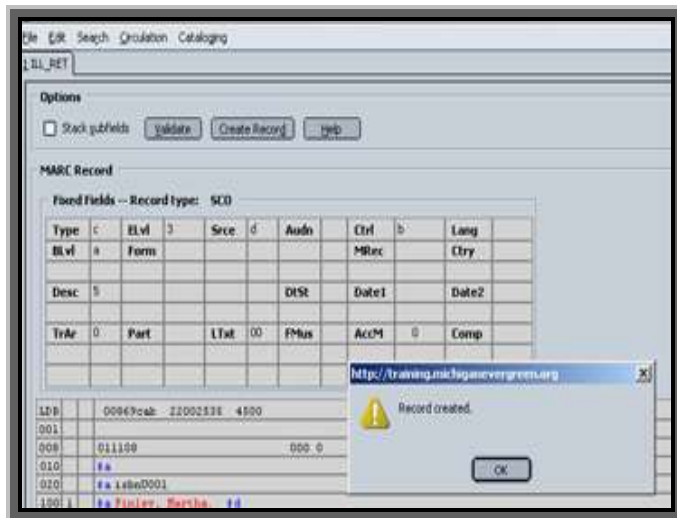
100 1 #a Finley, Martha. #d

245 1 0 #a Elsie Dinsmore #c

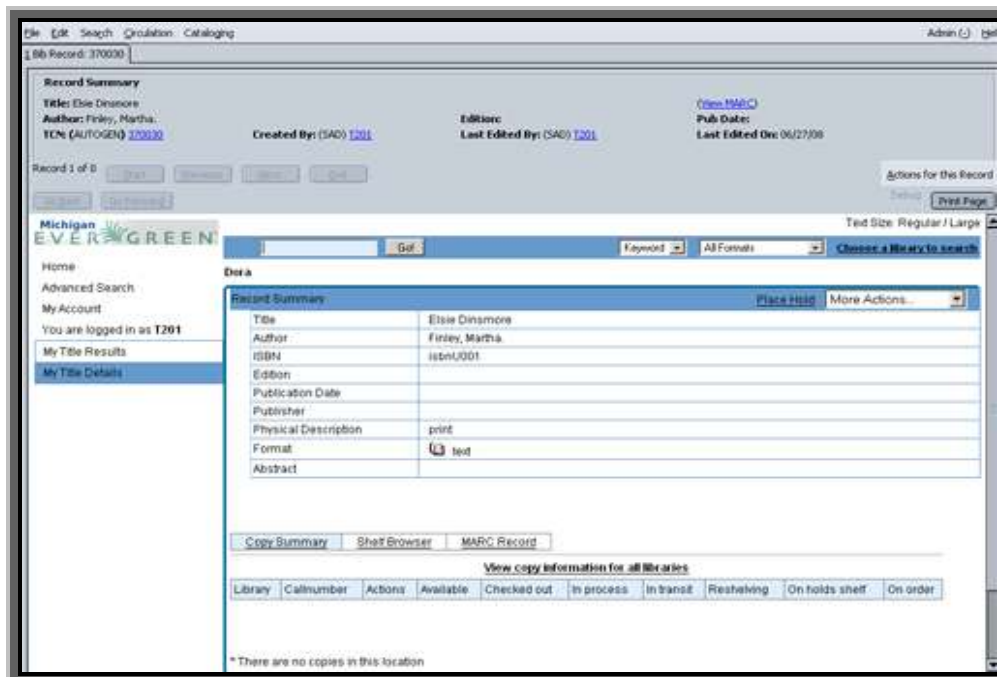
599 #a ILL

599 # Capital Area District Library

- After entering the above information, click **Create Record** and then Click **OK**.



- An OPAC view of the new record opens.

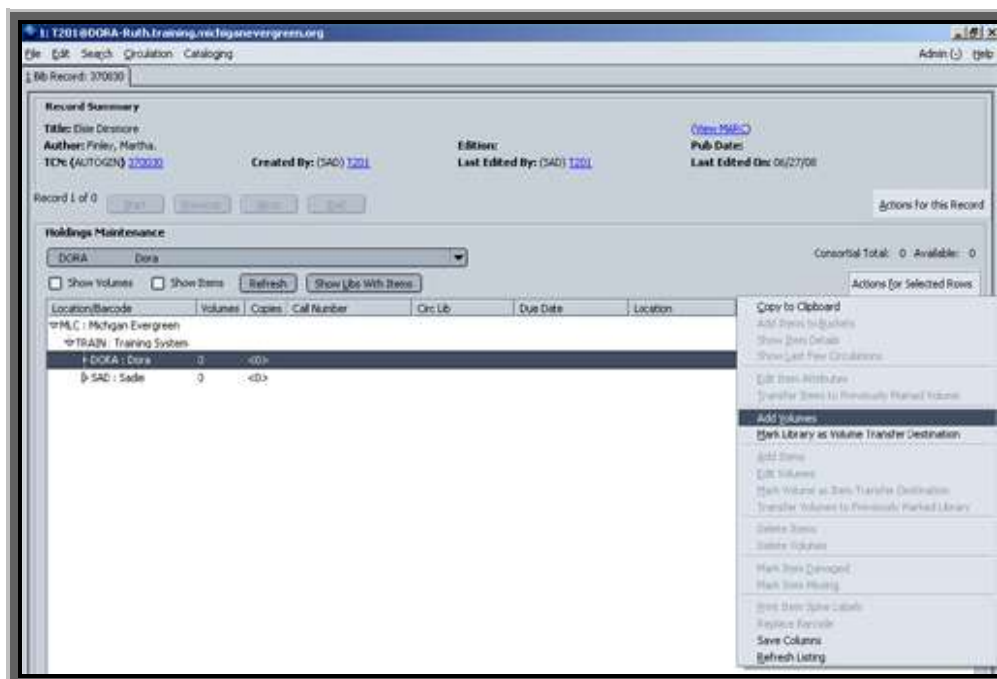


Now that you have created the bibliographic record, add an item.

1. In the right-hand corner of the screen, click the **Actions for this Record** drop-down field. Click **Holdings Maintenance**.



2. Select your library from the list and click the **Actions for Selected Rows** drop-down field. Click **Add Volumes**.



3. The Volume and Copy Editor window opens. Enter the number “1” in the # of volumes field and press Tab. (This number will always be “1” unless you are adding a multi-volume set.)

The screenshot shows a software window titled "Volume/Copy Editor". It is divided into two main sections. The top section, "Record Summary", displays metadata for a record: Title: Elsie Dinsmore, Author: Finley, Martha, TCN: (AUTOGEN) 370000, Created By: (SAD) T201, Edition: Last Edited By: (SAD) T201, Pub Date: (View MARC), and Last Edited On: 06/27/08. The bottom section, "Volume/Copy Creator", contains a dropdown menu for "Library" (currently showing "DORA"), a text field for "# of volumes" (containing "1"), a text field for "Call Numbers" (containing "ILL"), a text field for "# of Copies" (containing "1"), and a text field for a barcode (containing "ILLU001"). There are also checkboxes for "Check Barcodes?" and "Print Labels?", and an "Apply" button. At the bottom right of this section is an "Edit then Create" button.

4. Type “ILL” in the Call Number field and press Tab.
5. Enter “1” in the # of Copies field and press Tab.
6. Click in the adjoining box, and scan in the lending library’s barcode.
7. When all four boxes are filled in (# of volumes, Call Numbers, # of Copies, and Barcode), click the **Edit then Create** push button.

8. The Copies window opens. If you have an ILL copies template (which is different from the ILL MARC template you used earlier), click on the Templates drop-down box, select ILL, and click Apply.

Note: Copy templates let you automatically apply copy settings such as Shelving Location and OPAC Visible. Catalogers use them often, so if you're interested in creating one for ILLs, talk to your cataloger or to your local system administrator.

Copies

Record Summary

Title: Elsie Dinmore
 Author: Finley, Martha.
 TCN: (AUTOGEN) 370032
 Edition:
 Last Edited By: (SAD) T201
 Pub Date:
 Last Edited On: 06/27/08

Copy Editor

Templates: **ILL** [Apply] [Delete] [Import] [Export] [Save] [Reset]

Identify **ILL**

Barcode: ILLU001 1 copy
 Creation Date: 1 copy
 Creator: 1 copy
 Last Edit Date: 1 copy
 Last Editor: 1 copy

Location (1)

Shelving Location: Stacks 1 copy
 Circulation Library: DORA 1 copy
 Owning Lib : Call Number: DORA : ILL 1 copy
 Copy Number: <Unset> 1 copy

Circulation (2)

Circulate?: Yes 1 copy
 Holdable?: Yes 1 copy
 Age Protection: <Unset> 1 copy
 Loan Duration: Normal 1 copy
 Fine Level: Normal 1 copy
 Circulate as Type: <Unset> 1 copy

Miscellaneous (3)

Alert Message: <Unset> 1 copy
 Deposit?: No 1 copy
 Deposit Amount: 0.00 1 copy
 Price: 0.00 1 copy
 OPAC Visible?: Yes 1 copy
 Reference?: No 1 copy

Statistics (4)

Library Filter
 MLC : 1 Adult Fiction
 <Unset>
 MLC : 10 Adult Science Fi
 <Unset>
 MLC : 11 Adult Short Stor
 <Unset>
 MLC : 12 Adult Spanish Fi
 <Unset>
 MLC : 13 Adult Westerns
 <Unset>
 MLC : 3 Adult Horror
 <Unset>

[Create Copies (M)] [Close]

9. Verify the following settings on the Copies screen and update as needed. Make sure to click **Apply** each time you change a setting. The field will appear green if it's been applied.
- Location/Collection to “ILL” (or whatever your library uses for its ILL location)
 - Circulate? to “Yes”
 - Holdable to “Yes”
 - Alert Message to “ILL – return to ILL Dept after check in”
 - OPAC Visible to “No”

Copies

Record Summary

Title: Elsie Dinsmore
 Author: Finley, Martha.
 TCN: (AUTOGEN) 370104
 Created By: (DORA) 1234
 Edition:
 Last Edited By: (DORA) 1234
 Pub Date:
 Last Edited On: 09/15/08
[View MARC](#)

Copy Editor

Templates: Nonfiction

Identification

Barcode: ILL001 1 copy
 Creation Date: 1 copy
 Creator: 1 copy
 Last Edit Date: 1 copy
 Last Editor: 1 copy

Location (1)

Shelving Location: ILL 1 copy
 Circulation Library: DORA 1 copy
 Owning Lib : Call Number: DORA : ILL 1 copy
 Copy Number: <Unset> 1 copy

Circulation (2)

Circulate?: Yes 1 copy
 Holdable?: Yes 1 copy
 Age Protection: <Unset> 1 copy
 Loan Duration: Long 1 copy
 Fine Level: Normal 1 copy
 Circulate as Type: <Unset> 1 copy
 Circulation Modifier: <Unset> 1 copy

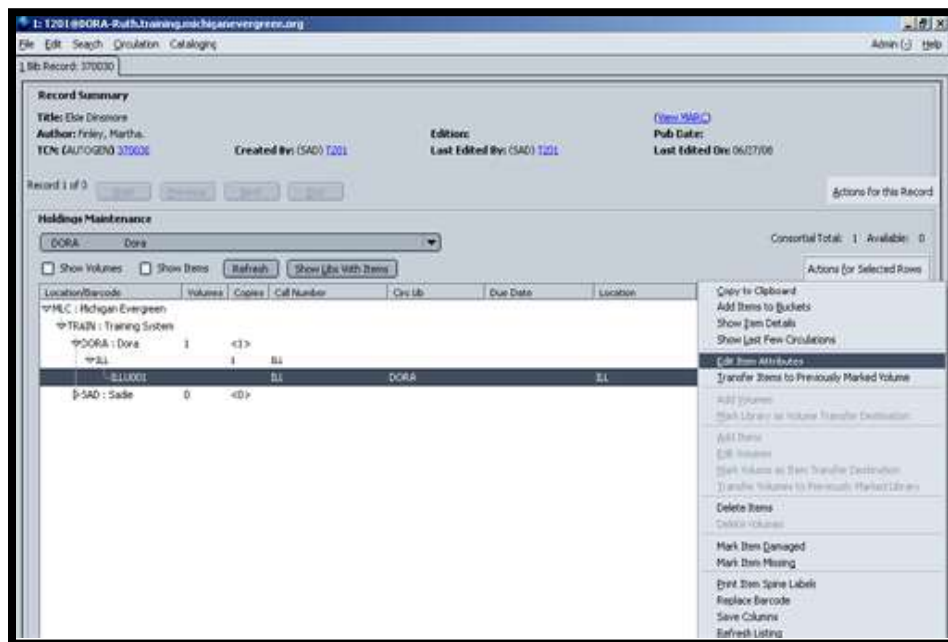
Miscellaneous (3)

Alert Message: ILL - return to ILL Dept after checkin 1 copy
 Deposit?: No 1 copy
 Deposit Amount: 0.00 1 copy
 Price: 0.00 1 copy
 OPAC Visible?: No 1 copy
 Reference?: No 1 copy

Statistics (4)

Library Filter: DORA : Building Location 1 copy
 <Unset> 1 copy
 TRAIN : 1 Adult Fiction: <Unset> 1 copy
 TRAIN : 10 Adult Science Fiction: <Unset> 1 copy
 TRAIN : 11 Adult Short Stories: <Unset> 1 copy
 TRAIN : 12 Adult Spanish Fiction: <Unset> 1 copy
 TRAIN : 13 Adult Westerns: <Unset> 1 copy
 TRAIN : 3 Adult Horror: <Unset> 1 copy

10. Click **Create Copies** in the lower right hand corner. A message window opens that lets you know the item has been created. Click **OK**.
11. You now need to edit the attributes of the item that you just created. Highlight the item row. Click the **Actions for Selected Rows** menu and click **Edit Item Attributes**.



12. Change the status from “In process” to “Available” and click **Apply**.

13. Click the **Copy Notes** push button in the lower right corner and click **Add New Note** when the Notes screen opens. Now add information to the record to indicate the patron who ordered this item on ILL. This is also a good place to add the lending library's call number for the ILL item (in case it gets shelved at your library by mistake).

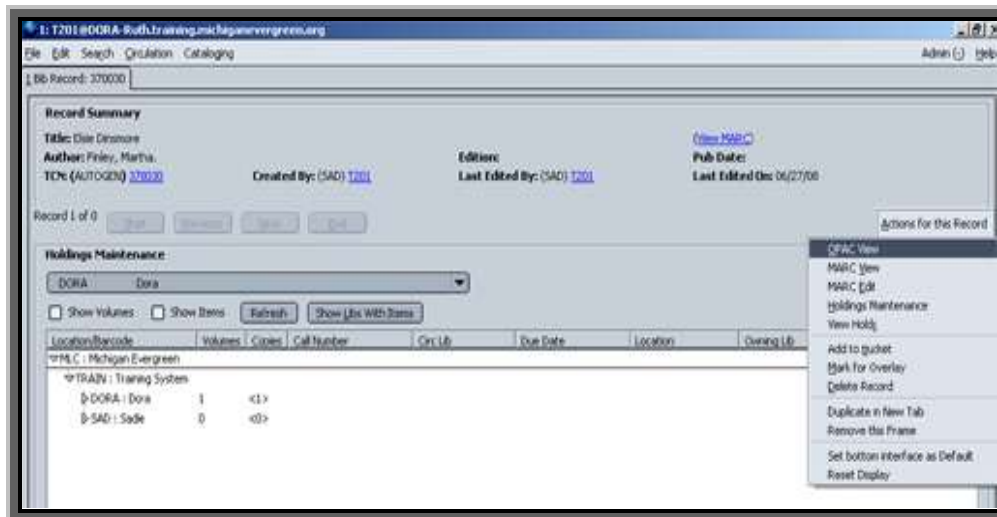
14. You will see a box next to Public? – DO NOT CHECK THIS BOX! The ILL patron's information needs to be private. Type "ILL Info" in the Title field (the word Title here means "title of the note"). In the Note field, add the patron's barcode number, the lending library's call number for the ILL item, and any other information you need for tracking. Click **Add Note** and then click **OK**.
15. A yellow window opens with the contents of the note. Click the **Close Window** push button. Then click **Modify Copies** and **OK**.



16. The record screen reopens.

Now create and capture a hold for the ILL patron for this item.

1. Click **Actions for this Record** and click **OPAC View**.



2. Click **Place Hold**.

The screenshot shows a web browser window with the URL t201.micora-south.trawing.michiganevergreen.org. The page displays a record summary for a book by Else Dinsmore. The record summary includes fields for Title, Author, ISBN, Edition, Publication Date, Publisher, Physical Description, Format, and Abstract. The 'Place Hold' button is highlighted in blue. Below the record summary, there are buttons for 'Copy Summary', 'Shelf browser', and 'MARC Record'. A section titled 'View copy information for all libraries' shows a table with columns for Library, Callnumber, Actions, Available, Checked out, In process, In transit, Reshelving, On holds shelf, and On order. The table is currently empty.

Library	Callnumber	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order
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3. Enter the patron's barcode number and click **Submit**.

The screenshot shows a form titled 'Place Hold' with a text input field labeled 'Enter recipient barcode:' containing the value 'P145'. There are buttons for 'Submit', 'Cancel', and 'Place hold for my account'.

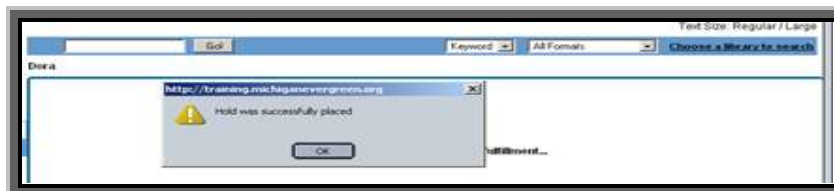
4. The Create/Edit a Hold page opens. Click **Place Hold**. (If the ILL Patron requests a special pickup location or provides a different phone or email for notification, edit this screen before clicking Place Hold.)

The screenshot shows the 'Create / Edit a Hold' form in the Dora system. The form is titled 'Create / Edit a Hold' and contains the following fields:

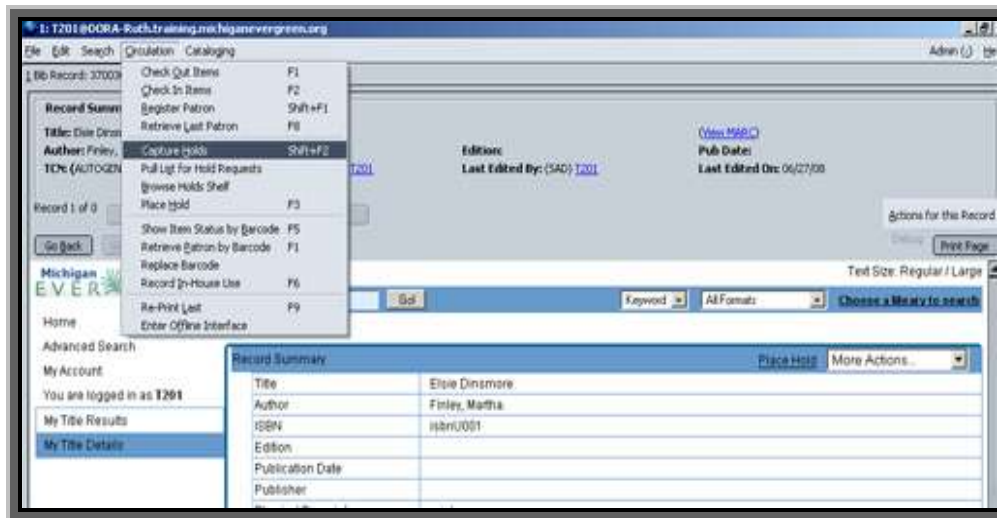
Recipient:	Patron, T
Title:	Elsie Dinsmore
Author:	Finley, Martha
Format:	Books
Physical Description:	print
Contact telephone number:	123-456-7890 (000-YYY-ZZZZ)
Enable phone notifications for this hold?	<input checked="" type="checkbox"/>
Contact email address:	(Patron has no configured email address)
Enable email notifications for this hold?	<input type="checkbox"/>
Pickup location:	Dora
Suspend this hold (Help):	<input type="checkbox"/>

Below the form is a section for 'Advanced Hold Options' with 'Place Hold' and 'Cancel' buttons.

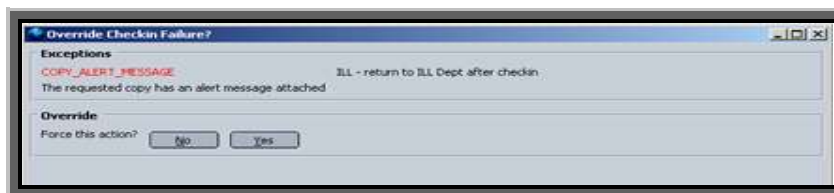
5. Click **OK** when the screen indicates that the Hold is successfully placed. If you receive an error message that there is no copy available for a hold, you will need to go back to check your settings. This can happen if you forgot to add a barcode or if the item is set at “no holds” by mistake.



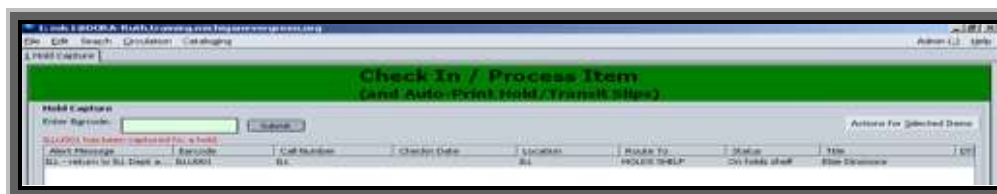
6. You now need to capture the hold for the ILL Patron. Click **Circulation** on the menu bar and click **Capture Holds**.



7. Scan in the barcode of the item. It will note that there is an Alert message. Click **Yes** to override.



8. You will briefly see a holds slip for printing appear in the upper left of the screen. In your library, this slip will print out so that you can place the holds slip with the item prior to putting the item on the holds shelf. Notice that the screen indicates that the item has been captured for a hold.

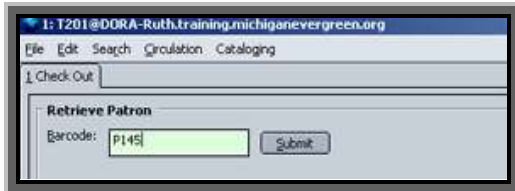


9. The ILL item is now ready for ILL Staff to place on the holds shelf for the patron to pick up.

Circ Staff workflow

Once the ILL has been processed and placed on the holds shelf, the Circulation Staff can check out the item to the patron like any other hold item. When the item is checked back in, however, Circulation Staff will need to be sure to route it back to the ILL Dept for return processing.

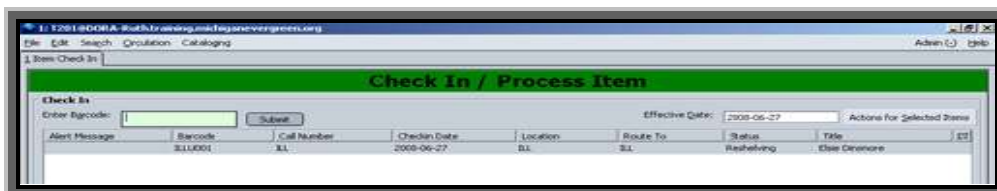
1. To check out the item, press the F1 function key. Scan in the patron barcode and click **Submit**.



2. The Patron screen will show an Alert that an item is on hold.



3. Click **Checkout**, scan in the barcode, and click **Submit**. Click **Yes** to override the Alert screen.
4. When the patron returns the ILL item, check it in as usual. Press F2, scan in the barcode, and click **Submit**.



5. Route the item to the ILL Department as the Alert Message indicates.

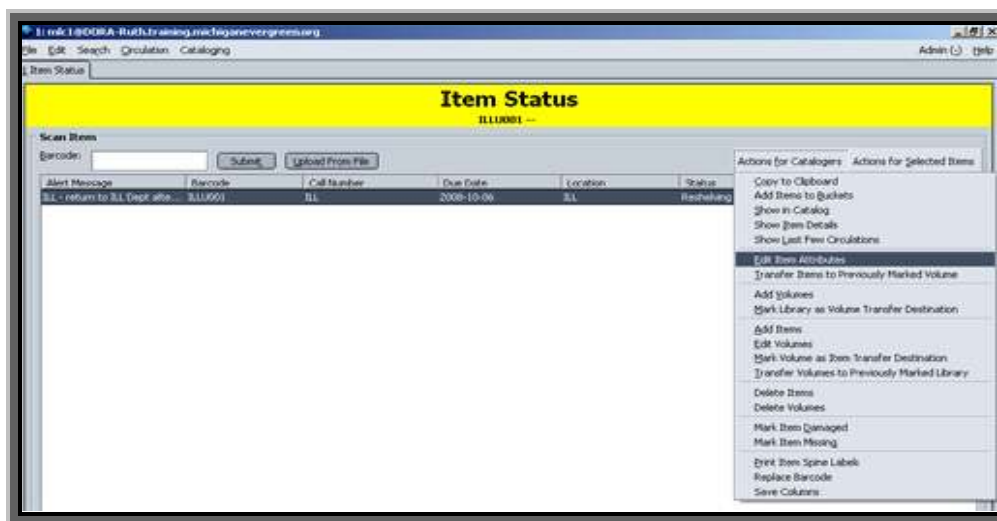
Final ILL Staff workflow

When the patron returns the ILL item and Circulation has checked in the item and returned it to ILL, the ILL Staff will need to delete the ILL Info Note that contains the patron's barcode and call number. The ILL Staff will also need to change the item attributes to indicate "no holds" and "non-circulating."

Note that the ILL Staff SCLENDS profile does not have permission to delete a copy or a record. If your workflow requires that ILL staff delete copies, ask your local system administrator to grant your ILL log-in account permission to delete copies.

When an item is turned back in to ILL:

1. Press the F5 function key to open the Item Status by Barcode page. Scan in the item barcode and click **Submit**.
2. Highlight the item and click on the **Actions for Catalogers** drop-down list. Click **Edit Item Attributes**.



3. Change Circulate? to "No" and Holdable? to "No."

Copies

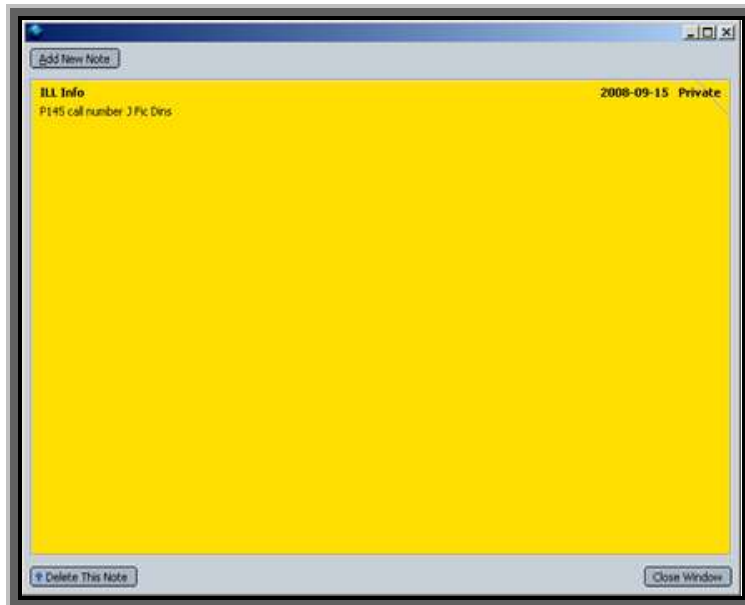
Copy Editor

Templates: ILL Apply Delete Import Export Save Reset

Identification	Location (1)	Circulation (2)	Miscellaneous (3)	Statistics (4)
Status Reshelving 1 copy	Shelving Location ILL 1 copy	Circulate? No 1 copy	Alert Message ILL - return to ILL Dept. after checkin 1 copy	Library Filter DORA : Building Location <Unset> 1 copy
Barcode ILL0001 1 copy	Circulation Library DORA 1 copy	Holdable? No 1 copy	Deposit? No 1 copy	TRAIN : 1 Adult Fiction <Unset> 1 copy
Creation Date 2008-09-15 1 copy	Owning Lib : Call Number DORA : ILL 1 copy	Age Protection <Unset> 1 copy	Deposit Amount 0.00 1 copy	TRAIN : 10 Adult Science Fiction <Unset> 1 copy
Creator nik1 1 copy	Copy Number <Unset> 1 copy	Loan Duration Long 1 copy	Price 0.00 1 copy	TRAIN : 11 Adult Short Stories <Unset> 1 copy
Last Edit Date 2008-09-15 1 copy		Fine Level Normal 1 copy	OPAC Visible? No 1 copy	TRAIN : 12 Adult Spanish Fiction <Unset> 1 copy
Last Editor nik1 1 copy		Circulate as Type <Unset> 1 copy	Reference? No 1 copy	TRAIN : 13 Adult Westerns <Unset> 1 copy
		Circulation Modifier <Unset> 1 copy		TRAIN : 3 Adult Horror <Unset> 1 copy
				TRAIN : 6 Adult Mystery <Unset> 1 copy
				TRAIN : 7 Adult New Fiction <Unset> 1 copy

Copy Notes Modify Copies Close

4. Click **Copy Notes** and click **Delete this Note** to remove Patron barcode information from the record.



- Respond **Yes** to deleting the Note, close out of the Notes screen, and click **Modify Copies** on the Attributes screen. Make sure to click Modify Copies before you click Close or you will lose your edits.

The screenshot shows the 'Copy Editor' window with a confirmation dialog box in the center. The dialog box has a yellow warning icon and the text 'Items added/modified.' with an 'OK' button. The background window is divided into several sections:

- Templates:** ILL (selected), Apply, Delete, Import, Export, Save.
- Identification:**
 - Status: Reshelving 1 copy
 - Barcode: ILLU001 1 copy
 - Creation Date: 2008-09-15 1 copy
 - Creator: mlc1 1 copy
 - Last Edit Date: 2008-09-15 1 copy
 - Last Editor: mlc1 1 copy
- Location (1):**
 - Shelving Location: ILL 1 copy
 - Circulation Library: DORA 1 copy
 - Owning Lib : Call Number: DORA : ILL 1 copy
 - Copy Number: <Unset>
- Circulation (2):**
 - Circulate?: No 1 copy
 - Holdable?: No 1 copy
 - Age Protection: <Unset> 1 copy
 - Circulation type: <Unset> 1 copy
 - Circulation Modifier: <Unset> 1 copy
- Miscellaneous (3):**
 - Alert Message: ILL - return to ILL Dept after checkin 1 copy
 - Deposit?: No 1 copy
 - Denouit Amount: <Unset> 1 copy
 - Reference?: No 1 copy
- Statistics (4):**
 - Library Filter: DORA : Building Location <Unset> 1 copy
 - TRAIN : 1 Adult Fiction <Unset> 1 copy
 - TRAIN : 10 Adult Science Fiction <Unset> 1 copy
 - TRAIN : 11 Adult Short Stories <Unset> 1 copy
 - TRAIN : 12 Adult Spanish Fiction <Unset> 1 copy
 - TRAIN : 13 Adult Westerns <Unset> 1 copy
 - TRAIN : 3 Adult Horror <Unset> 1 copy
 - TRAIN : 6 Adult Mystery <Unset> 1 copy
 - TRAIN : 7 Adult New Fiction <Unset> 1 copy

At the bottom of the window are buttons for 'Copy Notes', 'Modify Copies', and 'Close'.

- Depending on your library's policies, you might also wish to delete the Item and Volume. This is done on the Item Status page (use F5 to access). Delete the Item first and then the Volume. Again, talk to your local system administrator to get the required permissions if your library's workflow calls for them.